

# How to Guide

Performing a Stocktake



# Log into the Device

Enter your given username and password into the respective fields. Tap on the **Login** button to access the device.





# **Open Navigation Menu**

To navigate to the Inventory function, tap on the hamburger menu icon in the top-left corner.





## **Open Inventory**

A navigation menu will appear. Select the **Inventory** option to continue.







#### **Select a Place**

To start a stocktake, tap the **orange place button** as indicated. If a previous place has been set, the name will appear within the button.





#### **Search Place**

To search the location, type in the name of the location and press the search icon. A list of search results will appear, tap on the correct place to continue.





## **Creating a Stocktake**

Once a place has been selected, the user can create an inventory for the selected place. Press the **Create Inventory** button to create a stocktake.







## **Stocktake Summary**

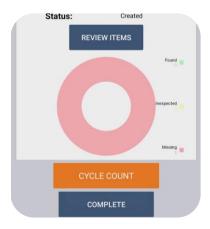
A summary page will be shown, outlining the stocktake location and expected number of items to stocktake.





# **Cycle Count**

To start scanning items and fulfilling the stocktake, press **Cycle Count.** 





# **Cycle Count Summary**

The cycle count summary page will be shown, including the number of items remaining to be scanned, and the number of items that have already been scanned.







### **Scanning Items**

Tap the trigger quickly to begin scanning items. The bottom of the screen will show Reading to indicate that the handheld is scanning. Accompanying beeps will be heard to indicate when an item has been scanned.





# **Items Remaining**

As items are scanned, the **Items Remaining** value will steadily decrease. Continue scanning until the **Items Remaining** value reaches 0 or beeps are no longer heard.





## **Adjusting the Power**

During the scan, you can adjust the power settings of the stocktake to **High Power** if scanning a large number of stock, or **Low Power** if scanning items either in close proximity or individual items.







## **Uploading**

Once scanning is completed, you can finalise and upload the scan to Loca.fi for processing by pressing **Upload**.





### **Inventory Summary**

Once uploaded, you will be returned to the stocktake summary page. You can view a summary of items that have been found, missing or unexpected as well as overall accuracy.





### **Complete the Stocktake**

Once you have reviewed the summary, you can complete the stocktake by pressing **Complete**.

If you wish to review the summary once completed, you can do so from the web platform.



